

Church Expansion

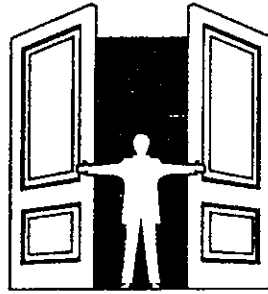
Policies and Procedures

for

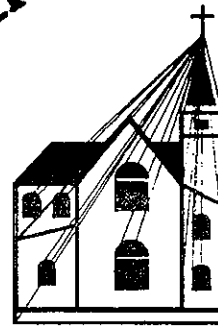
Land Acquisition



Mission Formation



New Construction



Policies and Procedures

approved

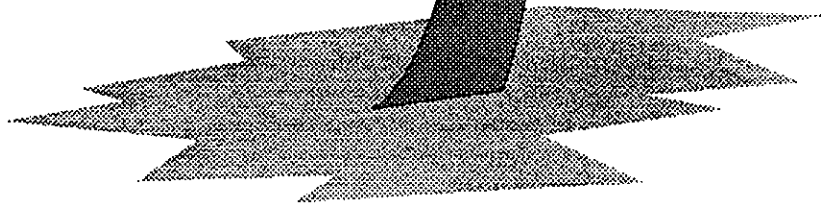
by the **Bishop and Diocesan Board**
Episcopal Diocese of Central Florida

Aug 27, 1991



Part One

Land Acquisition



Land Acquisition

I. General Comments

The following procedures should be considered a guide and not an absolute statement of requirements because real estate is an endlessly varied commodity. Communities and their neighborhoods are at best only comparable. They are never alike. Some are growing almost daily, some are static and some are declining. Each site considered must be weighed against its long term prospects. In many of our communities "long term" might be only a few years in that it may be desirable to meet current needs for a church in full knowledge that replacement may be needed in the foreseeable future.

Even with the best demographic and traffic pattern studies, selection of a suitable site for a church is very much a subjective matter. It is imperative to drive around the study area in a radius of about five miles to see where the people who may be expected to form the congregation live, what routes they might travel, what residential and commercial growth is now or may soon be taking place, and in general get a "feel" for the area.

It is not sound church growth policy to establish a new church ONLY to serve persons who are presently members but who would find the new one more convenient. Churches should be expected to attract their congregation from persons who live nearby and who may or may not be currently members of the Episcopal Church. However, while exceptions are legion, it is generally true that the Episcopal Church tends to attract persons of moderate to upper income and job levels. A site located between upper and lower level areas could be highly successful but one in an entirely lower level neighborhood might struggle for years and never become a viable parish. Thus demographic studies, while certainly not the key indicator, should be carefully considered. There are several commercial services available for this work.

II. Development of Long Range Plan

We feel it is essential that a long term assessment be made by the **Commission for Congregation Development** and Diocesan staff for new mission development for the Decade 1990-2000. This plan should show the magnitude of growth expected and general priority for actions including projected allocations of available resources to accomplish its implementation. Those missions currently in active development should be assigned early priorities in the 10-year long range plan. Close coordination and consultation with each Deanery is desirable and necessary when initial priorities are assigned throughout the Diocese over the next decade. One benefit of such a plan is that, consistent with available assets, land bank sites can be purchased well in advance of need resulting in lower prices and a wider choice of sites in any given area.

III. Specific Considerations for Site Acquisitions

- A. Criteria for all sites including immediate and potential long term use:
1. Demographic survey completed covering the contemplated area.
 2. Determine minimum size lot requirement based on factors such as availability of water and sewer, drainage conditions, retention area requirements, water table, soil type and other environmental considerations. Parcels of less than 5 acres for new missions should receive careful analysis and justification of increased density and lack of expansion potential.
 3. Reasonable evidence that future zoning would not preclude church use.
 4. Reasonable evidence of future public road access to parcel.
 5. Study of any possible future road changes within the area which may affect the parcel including any potential right-of-way acquisitions.
 6. Topographic and boundary survey required (see also page 20, step V).
 7. A determination that church use is compatible with long range growth plans of the local municipal or county authority and in compliance with the comprehensive growth plan of the community.
 8. Consideration of the effect a new mission would have on other Episcopal churches located in the same general area.
 9. Ensure the site area is contained in the Diocesan long range master plan for future churches and has the support of the Deanery concerned.
 10. Consider the potential for resale of site if future determination is made that a purchased site should be dropped from the Diocesan master growth plan.
 11. Evaluate surrounding zoning for compatibility.
- B. Additional and/or complimentary purchase criteria for sites being considered for immediate development as missions or churches.
1. Zoning permitting church use after consideration of all restrictions such as a liquor sales outlet proximity to site, etc. including restrictions for a temporary portable unit.
 2. Storm water retention and storm water overflow adequately provided for.
 3. Immediate availability of water and sewer service.
 4. Public access adequate for site with driveway permits issued, if required.
 5. Evaluation of impact fees, if any, to be assessed.
 6. Determine whether there is any pending right-of-way.
 7. Appraisal report, if issued, should support agreed price.
 8. Consider visibility of site from public roads.
 9. Consider any sign ordinances or restrictions.
 10. If parcel is part of a new development, consider protective covenants seller should provide.
 11. Evaluation to determine whether hazardous waste is on the site.

IV. Authority For Site Acquisitions

- A. The **Commission for Congregation Development** acting on authority of the **Diocesan Board** may enter into contracts for land purchases which are funded exclusively through monies provided by Diocesan resources. All such contracts will have as a condition final **Diocesan Board** approval.

- B. A local parish may purchase a site(s) for its use in establishing sponsored missions only with the approval of the **Diocesan Board**. The proposed mission should be in the long range growth plan of the Diocese and the individual parish will follow these procedures and criteria before making a purchasing recommendation.

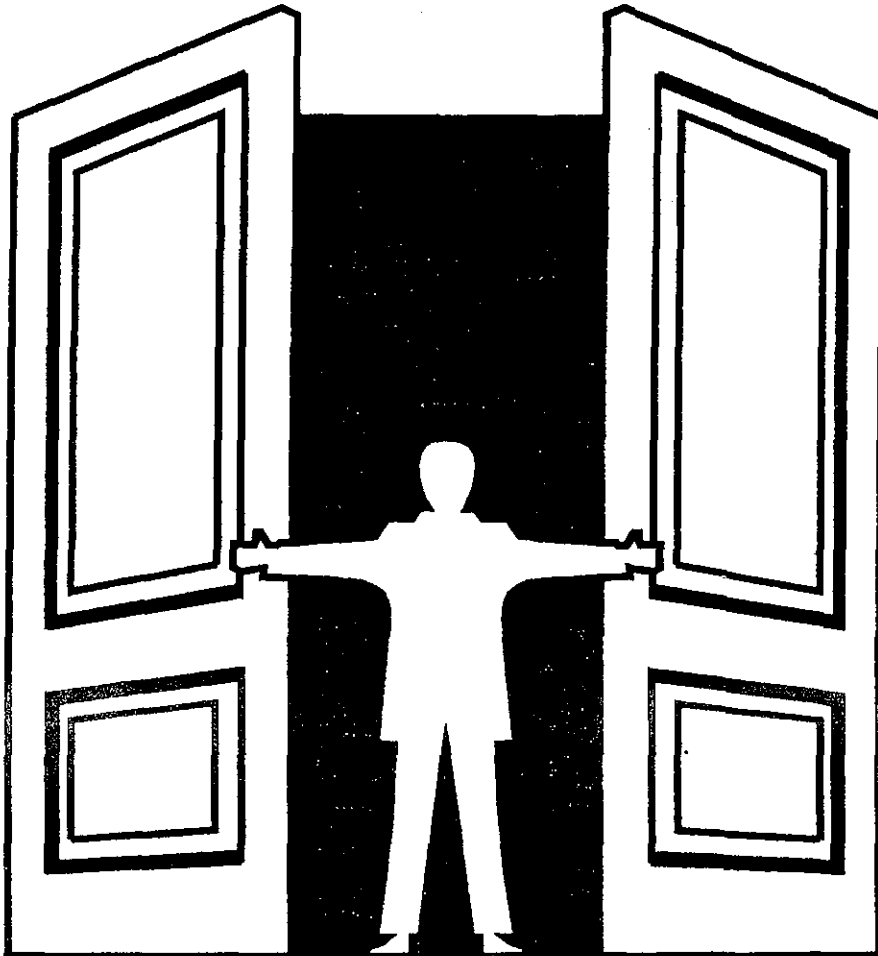
- C. All contracts should normally consider the following criteria:
 - 1. The escrow deposit amount should be modest and refundable if closing does not ensue.
 - 2. Contract subject to approval by the **Diocesan Board** within a specific period of time, normally four months if funding is to be provided by Diocesan resources.
 - 3. Agreement spells out intent of buyer to use land for church and related facilities, and should be contingent upon final zoning approval.
 - 4. Seller should pay cost of boundary survey, title insurance, deed stamps, and real estate commission, if any.
 - 5. Negotiation of a purchase money mortgage is desirable whenever possible, with no prepayment penalties.
 - 6. All contracts should be subject to acceptable soil borings and perk tests by the buyer.

- D. MAI appraisals with a narrative report to confirm value are ordinarily required.



Part Two

Mission Formation



New Mission Formation (Outline)

I. The Call to Mission.

- A. Mission venture proposed.
- B. **Bishop** is informed.
- C. Permission from **Bishop** to form a Fellowship.

II. The tasks of the Fellowship.

With the assistance of the **Commission for Congregation Development**: Identify needs/gifts for ministry, establish measurable goals, prepare a mission statement, find a temporary location for worship and meetings, prepare a financial plan, and prepare a plan for evangelism and church growth.

III. Clergy Appointed.

At any point in the above process the **Bishop** may appoint clergy to assist the Fellowship.

IV. Mission Study Committee.

A Mission Study Committee will be appointed by the **Bishop** during this time as a Fellowship. The purpose of this committee is to make a recommendation to the **Bishop** concerning this mission venture.

V. Application to Become an Organized Mission.

A Fellowship can apply to the **Bishop** to become an Organized Mission when not less than twenty-five pledging families and/or individuals have associated themselves together for this purpose, have demonstrated an ability to meet the financial and growth plans, have received certificates of approval/disapproval from all nearby parishes and missions, and have declared their conformity and submission.

VI. The Bishop will make a recommendation to the Diocesan Board.

VII. The Diocesan Board will approve or disapprove the mission venture.

VIII. As an Organized Mission

- A. Vicar appointed, Choose name with advice and consent of the **Bishop**.
- B. Be admitted to Convention.
- C. Submit quarterly reports.
- D. Vicar/Leadership meet with **Commission for Congregation Development** once a year.

Mission Formation

Introduction

The following plan for the development of new missions in our diocese is based, primarily, on "reasonable expectations" for new congregations in perceived "growth areas". Most new congregations will be established in these areas. However, our Lord also calls us to be in areas that may not be characterized by growth, or areas that may not have adequate financial resources, or to do a new ministry that may not require a new, autonomous, congregation. In such cases as these, or for other good reason, the Commission for Congregation Development may consider, and the Bishop may allow, exceptions to the following plan.

We are utterly dependent upon our Lord to lead and empower us. Therefore, any effort to support the birthing of new ministries and congregations calls us all to prayer.

Any overall plan for the development of missions requires the regular analysis and evaluation of the demography of the diocese. Therefore, the Commission for Congregation Development is charged with the responsibility of evaluating the demography of each of the deaneries at least once every five (5) years. In the intervening years the commission will keep itself abreast of population changes and unusual developments in the deaneries.

In order to maximize the evaluation and utilization of human resources the Commission for Congregation Development will maintain a current portfolio of lay and clergy resources to assist in the development of new mission ventures.

I. The Call to Mission

- A. A new mission venture may be proposed by any one of the following:
 1. Christians residing in the area.
 2. A local parish.
 3. The Deanery.
 4. The Commission for Congregation Development.
 5. The Bishop.
- B. After initial discussion and prayer, the very next step is to inform the **Bishop** of the desire and intention to form a new mission, and to declare their conformity to the Doctrine, Discipline, and Worship of this Church and submission to the authority of the Diocese and its Canons.

II. Tasks of the Fellowship

Upon receiving permission from the **Bishop** the interested persons will proceed with the new ministry in the following manner as a Fellowship, not yet having applied for mission status:

- A. With the assistance of the **Commission for Congregation Development** the interested persons will identify the needs and gifts for ministry, establish measurable goals, prepare a mission statement, develop a plan for evangelism and church growth, and prepare a financial plan for the Fellowship and its ministry.
- B. They will find a temporary location for worship and meetings.
- C. The Fellowship may choose a name by which they shall be known, subject to the approval of the **Bishop**.
- D. Secure insurance coverage (see appendix B).

III. Clergy Appointed

The **Bishop** may appoint clergy or a licensed pastoral leader to be in charge of this mission effort.

IV. Mission Study Committee

During this time as a Fellowship the **Bishop** may appoint a Mission Study Committee. The Committee may be composed of the following persons:

- Two persons from the Fellowship.
- The Clergy in charge of the Fellowship.
- At least one person from the **Commission for Congregation Development**; who will chair this Study Committee.
- One person from the **Finance Commission**.
- One person from the Commission on Evangelism
- One person from the Deanery.
- One person from each of the adjacent parishes & missions.

The task of the Mission Study Committee will be to make a recommendation to the **Bishop** concerning this mission venture. The following items should be considered:

- An analysis of the demographics.
- Possible property location and costs.
- The status of neighboring Episcopal congregations.
- The status of other churches in the immediate area.
- Provide a clergy/lay leadership profile and determine availability of same.

V. Application to Become an Organized Mission

Not less than twenty five pledging families and/or individuals, demonstrating an ability to meet the financial and growth plans for ministry and declaring their conformity to the Doctrine, Discipline, and Worship of this Church and their submission to the authority of the Diocese and its Canons, may apply to the **Bishop** to become an organized mission.

This application shall be accompanied by a letter showing the approval/disapproval of the Rector and Vestry of each parish, and the Vicar and Church Committee of each mission, which are located nearby to the proposed site of the mission; or evidence that such a letter was not obtainable. Any relocation of said mission must be considered as a new application requiring a new Certificate from each of the contiguous parishes and missions.

VI. Bishop's Recommendation

Upon receiving the application of the Fellowship to become an Organized Mission, the **Bishop** and **Commission for Congregation Development** shall evaluate the report of the Mission Study Committee. If favorably considered, the **Bishop** shall recommend approval to the **Diocesan Board**.

VII. Diocesan Board's Approval

Upon receipt of the **Bishop's** recommendation the **Diocesan Board** will make a decision concerning this new Fellowship. The **Bishop's** recommendation shall include specific information concerning the proposed location, a date for its formation, a financial plan, a leadership plan, and a plan for church growth. If approved, the Fellowship will become an organized mission.

VIII. As an Organized Mission

- A. The **Bishop** shall appoint the Vicar. The members of the mission shall formally choose the name by which they shall be known, subject to the approval of the **Bishop**. (The name may have been chosen tentatively at an earlier date.)
- B. The mission shall be presented for admission to the next Annual Diocesan Convention.
- C. The mission shall initiate the incorporation process and obtain state and federal tax exemptions.
- D. Each mission is required to prepare and present a quarterly report to the **Commission for Congregation Development**. This report will include all quarterly financial data, the number of services and attendance in the quarter, the status of church growth plans, and any other information about mission life that will assist the **Bishop** and the **Commission** in being kept apprised of the current ministry of the mission. The **Commission for Congregation Development** will review these reports and, in turn, make timely and appropriate reports (at least annually) to the **Bishop** and the **Diocesan Board**.
- E. The Vicar and selected leaders of each of the missions of the diocese will meet annually with the Parish and **Commission for Congregation Development**. The purpose of this meeting is to review and evaluate the ministry that is being accomplished.

Whenever the number of baptized persons of an organized mission ceases to be able to meet the criteria for ministry for which it was established, the **Bishop** will appoint members of the **Commission for Congregation Development** to work with the leadership of the Mission to develop a plan to continue, or not continue, the ministry for which it was established.

If needed, and available, the diocese may provide financial assistance to the mission.

The Formation of a Mission

The Call to a New Mission Venture
Local Christians, Parish, Deanery, Commission for Congregation Development, The Bishop

THE BISHOP

MISSION STUDY COMMITTEE

Composition

- FELLOWSHIP - 2
- CLERGY/FELLOWSHIP - 1
- AT LEAST ONE FROM MDC/
TO BE CHAIR
- FINANCE - 1
- EVANGELISM - 1
- DEANERY - 1
- FROM EACH CONTIGUOUS
PARISH - 1

Areas of Consideration

- TREND ANALYSIS
- POSSIBLE PROPERTY LOCATION AND COSTS
- STATUS OF NEIGHBORING EPISCOPAL PARISHES
- STATUS OF OTHER NEIGHBORING CHURCHES
- AVAILABILITY OF CLERGY/LAY LEADERSHIP

THE FORMATION OF A FELLOWSHIP

- PREPARE A MISSION STATEMENT
- IDENTIFY NEEDS/GIFTS FOR MINISTRY
- ESTABLISH A MEASURABLE GOAL
- PREPARE A FINANCIAL PLAN
- FIND A TEMPORARY LOCATION FOR WORSHIP AND MEETINGS
- PREPARE A PLAN FOR EVANGELISM AND CHURCH GROWTH
- DECLARE CONFORMITY TO THE DOCTRINE, DISCIPLINE AND WORSHIP OF THE CHURCH
- SUBMIT TO THE AUTHORITY OF THE DIOCESE

MAKE RECOMMENDATION TO THE BISHOP

APPROVED BY DIOCESAN BOARD

MISSION ORGANIZED

ADMITTED TO DIOCESAN CONVENTION

DECISION TO BE A MISSION

- AT LEAST 25 PLEDGING FAMILIES AND/OR INDIVIDUALS
- CONSENT OF THE BISHOP
- APPLY TO THE BISHOP
- DECLARE CONFORMITY TO THE DOCTRINE, DISCIPLINE AND WORSHIP OF THE CHURCH
- SUBMIT TO THE AUTHORITY OF THE DIOCESE
- A PROPOSED LOCATION & CHOICE OF NAME
- VICAR APPOINTED
- DEMONSTRATED ABILITY TO MEET PLANS
- LETTERS OF APPROVAL/DISAPPROVAL

COMMISSION FOR CONGREGATION DEVELOPMENT

Mission Evaluation

Trend Analysis

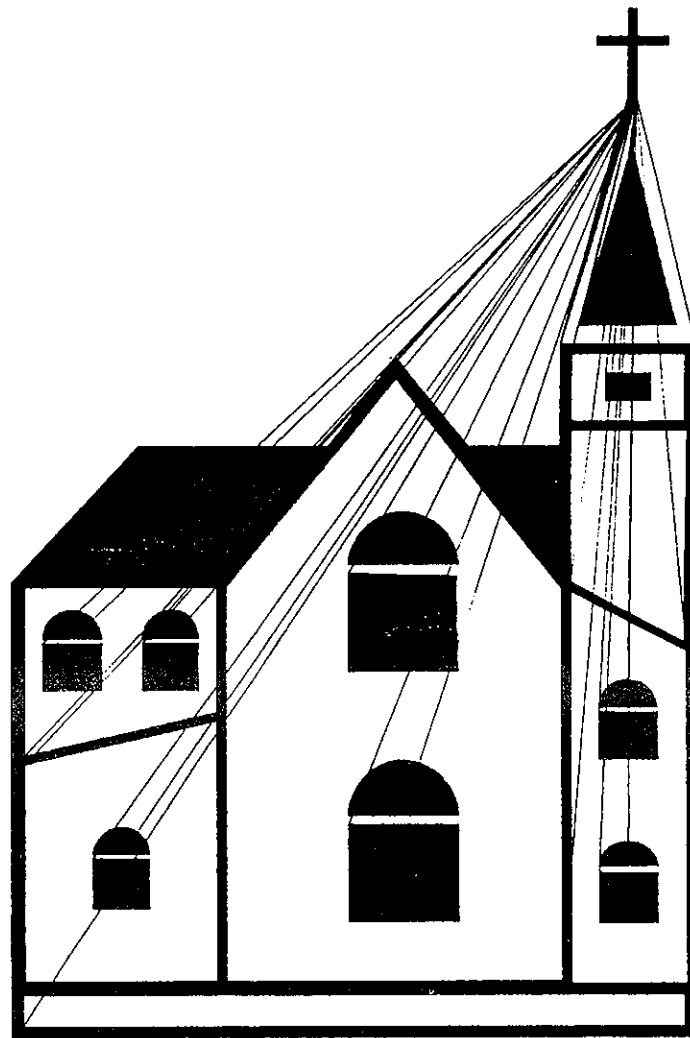
Architecture

Land Acquisition

Human Resource Development

Part Three

Construction of Church Facilities



Planning and Design Process for Construction of Church Facilities

Introduction:

Where there is no vision people perish. (Proverbs 29:18)

Your sons and your daughters shall prophesy. (Joel 2:28)

Modifications to the built environment may successfully be undertaken by any congregation following an orderly process that avails itself of both leadership and vision.

This process is outlined in steps I through X following and summarized in appendices A (page 18) and C (page 20). Congregations are urged to utilize the appropriate manuals from the Episcopal Church Building Fund.

This section is intended to provide a general outline of the construction process. Additional tasks may be adopted by individual congregations to address their specific situation.

I. Goal and Feasibility

All planning processes should start with a **goal statement** and feasibility study that involves the input of the entire congregation. This input is vital to the 'ownership' that must develop if support is to be generated and sustained. The feasibility evaluation should include analysis of the congregation's ability to pay for the project.

Responsible Parties:

*Congregation
Priest-in-Charge
Mission Committee*

II. Selection of Project Committee

The **Project Committee** or its equivalent should be established to address the issues of planning, fund-raising, financing, communication and the other myriad decisions, inspections, approvals and selections that are part of the design and construction process. Subcommittees such as Design, Finance, Fund-raising and Promotion may be appropriate.

Responsible Parties:
Mission Committee
Priest-in-Charge

III. Selection of Professional Consultants

The selection of professional consultants is a crucial step for the success of the project. Guidelines for this step may be obtained from the American Institute of Architects and from the Episcopal Church Building Fund of The Episcopal Church Center. The congregation should retain legal counsel prior to this point to review and advise on all contractual obligations and to review the Canons of the Diocese. The **Project Committee** and professional consultants constitute the **Design Team**.

Responsible Parties:
Owner's Representative
Mission Committee
Legal Counsel

IV. Planning

As soon as the **Design Team** (architect, liturgical consultant, landscape architect, civil engineer, interior designer) is selected, the **Project Committee** should begin to formulate criteria to direct the decisions of the design process. Criteria should include but not be limited to:

- A. liturgical function and flexibility
- B. program requirements and capacities
- C. budgetary resources, limits and constraints
- D. handicap accessibility in excess of code mandated access. Sight and hearing impaired handicaps should be considered in addition to wheelchair access.
- E. energy conservation and sustainability

Responsible Parties:
Project Committee
Congregation
Design Team

V. Site

The process of site selection and acquisition are covered elsewhere in the **Land Acquisition** section of this document (pp. 2-5). However, for both expansion as well as new facilities a minimum of survey elements must be obtained including:

- A. Boundary survey (including survey of existing facilities if expansion is contemplated..)
- B. Topographic survey (including storm water retention/detention capacity and outfalls.)

- C. Utility services, infrastructure and easements
- D. Tree spot (usually for all trees on site in excess of 6" diameter diameter).
- E. Location map (for use in permit documents)
- F. Flood prone boundary designation

Responsible Parties:

Project Committee
Mission Committee
Insurance Counsel
Legal Counsel
Design Team

VI. Master Site and Facilities Plan

At this point a master plan for a new facility or an updated revision for the expansion or renovation of a facility is required to assure efficient long term use of the site.

Responsible Parties:

Design Team
Project Committee
Mission Committee

VII. Preparation of Presentation, Schematic Design and Financial Pro Forma

As this step begins, contact the Diocesan Administrator for assistance in the preparation and scheduling of the presentation required in step VIII. The Schematic Design Phase is well defined in Article 2.2 of the Owner-Architect Agreement, AIA Document B141 (current edition). Article 2.2.5 requires a preliminary estimate of construction cost. A five year financial plan shall be prepared which shall include at a minimum:

- A. construction cost estimate, including contingency
- B. cost of financing during construction
- C. architectural and engineering costs
- D. fixtures, furnishings and equipment fees
- E. impact fees and other permitting costs
- F. inflation index
- G. insurance costs (see Appendix B)
- H. resources
- I. demographics
- J. projected income (5 years)
- K. operating costs (5 years)
- L. debt service (5 years)

Responsible Parties:

Design Team
Project Committee

VIII. Preliminary Presentation

Material produced in steps I-VII must then be presented to the **Commission for Congregation Development**, the **Finance Commission**, and the **Diocesan Board** for their preliminary review, comment and approval to proceed. Internal schedules should allow a minimum of two months for these presentations before proceeding with design development.

Responsible Parties:

Priest-in-Charge
Warden(s)
Project Committee
Architect of Design Team

IX. Design Development, Construction Documents, and Bidding or Negotiation Phase

In preparation for step X contact the Diocesan Administrator for assistance and scheduling of meetings. A1A Document B141 (current edition), Article 2.3 describes the design development phase. Major changes in program, design or budget cost estimates must be returned to the **Commission for Congregation Development** and **Finance Commission** for review and approval.

Article 2.4 describes the construction document phase which includes the beginning of the permitting process. Article 2.5 describes the bidding or negotiating phase which will result in a firm contract price and a final (hopefully) modification to the financial pro forma.

Responsible Parties:

Design Team
Owner's Representative
Legal Council

X. Final Submittal

When contract for construction has been obtained and approved by legal counsel of the congregation and when vestry or mission committee approval has been obtained, final submittal shall be made to **Commission for Congregation Development**, **Finance Commission** and to the **Diocesan Board** for final approval. Note: submittal requirements of steps VIII and IX must be fulfilled prior to final submittal of Step X. **Diocesan Board** approval of requests shall indicate all conditions to be met.

Responsible Parties:

Vestry/Mission Committee
Owner's Representative
Priest-in-Charge

XI. Permitting, Construction, Occupancy

Upon approval of the Diocese, the project may move forward to Permitting, Construction and Occupancy.

Permitting is the process of review of the construction documents by the authorities having jurisdiction over the construction of the project and ultimately issuing the required permits for construction. This task may be undertaken simultaneously with the Diocesan review as a means of accelerating the progress of the project since nothing in the permitting process requires that the project be constructed.

Construction is the process of building the facilities. If funds are being drawn from the Diocese the reports of work performed to the date of the request for funds must be forwarded to the Diocese for review and approval. The Contractor will prepare a "Schedule of Values" which describes the general categories of work and the percentage of each of the categories completed in order to calculate the amount of the request. The Architect will review and approve the draw request for the Owner.

Occupancy involves moving in furniture and equipment and preparing for use of the facilities. Additionally Occupancy involves the contractor doing the finishing touches to the building and resolving all outstanding financial issues with the contractor. At this time it is incumbent upon the Owner to make sure insurance, utility accounts, occupational licenses, lien releases and the like are all properly addressed. Dedication and Celebration is once again a point of beginning to advance the Missions and Programs of the Church for which the facilities have been built.

APPENDIX A - PLANNING AND DESIGN PROCESS

(I*-X* refer to steps I-X of main text above)

VISION AND GOAL I* — PROJECT COMMITTEE II* — DESIGN TEAM III* — DESIGN GUIDELINES IV* — SITE SELECTION V* — MASTER PLAN VI* — SCHEMATIC DESIGN VII* — FINANCIAL PRO FORMA

PRELIMINARY PRESENTATION TO COMMISSION FOR CONGREGATION DEVELOPMENT FINANCE COMMISSION DIOCESAN BOARD APPROVAL VIII*

DESIGN DEVELOPMENT IX* — CONSTRUCTION DOCUMENTS — BIDDING OR NEGOTIATION — CONTRACT PROPOSAL

FINAL PRESENTATION AND DIOCESAN BOARD APPROVAL X*

PERMITTING — CONSTRUCTION — OCCUPANCY, DEDICATION AND CELEBRATION XI*

Insurance Requirements

Appendix B

Submit to the Insurance Consultant (to the **Bishop and Diocesan Board**) the following information:

I. Prior to leasing or rental of facilities

- A. Lease or rental agreement
- B. Construction of facility (masonry, frame, etc.)
- C. Plate glass coverages (measurement)
- D. Square footage of facility
- E. Assets and/or personal property* to be used and/or owned by congregation
- F. Any loss payee

*Note: Fixed assets such as pews, altar, organ, (these that are attached to the building) can be considered as building value and not as personal property value.

II. Prior to hiring a vicar or priest-in-charge, submit contemplated date of employment and salary

III. Prior to purchase of land, submit (see also survey requirements of Step V):

- A. Legal description
- B. Number of acres
- C. Front footage on any public road

IV. Prior to construction of new or expanded or renovated facilities, submit (see also financial pro forma requirements of Step VII):

- A. Contract of construction with contractor
- B. Review of contract for
 1. Builders risk insurance
 2. Performance and payment bond
- C. Total cost of construction broken down to:
 1. Site preparation
 2. Architect fee
 3. Parking facilities
 4. Landscaping
 5. Building
 6. Assets and/or personal property to be housed in new facility
 7. Mortgagee
 8. Amount of mortgage

Appendix C: Planning, Design and Construction Overview *

Definition	Planning	Programming	Schematic Design	Design Development	Construction Documents	Contractor Selection	Construction	Post Construction
Purpose of Phase	What needs to be done Goal statement and...	A written description of building and site needs, opportunities and constraints	A preliminary design solution to the program	Refining the Design.	Drawings and specifications to be used for final pricing permitting and construction	The process of selecting a builder and finalizing construction contracts	The process of constructing the project	Moving in, making operational, contract close-out
Persons or Groups Involved	Collect and analyze data about perceived needs	Architect/Building Committee, parish groups and congregation	Preliminary design solution for review and revision based on the program	Refine schematics and incorporate mechanical, electrical and structural design	Create documents to technically communicate all aspects of construction to the Contractor	Select the General Contractor and negotiate the construction contract	Construct the facilities	Tie up all loose ends. Install furniture & equipment. Close out contracts
Diocesan Involvement	Architect/Planner, Very, Pastor/Recur, Project Committee	Architect Building Committee, parish groups and congregation	Architect, Building Committee, Finance Committee	Architect, Design Team, Building Departments, Building Committee, Contractors	Architect, Design Team, Project Committee	Architect, Project Committee, Contractors	Contractor, Architect, Owner's Representative, Finance Committee, Building Department	Architect, Contractor, Maintenance Personnel, Very
Design and Construction Tasks	Compare Concessions for CCB's/parish. Develop CCB (CCB)	Share a copy of facilities program with CCB	CCD and Finance Committee review and approval (Section IV-VIII)	Update CCB of changes to scope (Section IX)	Update CCD of changes to project costs or project scope (Section IX)	Requires final approval of CCB (Section IX-X)	Draw funds as necessary (if Disburse is cost-sharing)	Blowing of the new facilities
Budgeting Tasks	Retain professional consultant. Collect and organize information about growth, existing facilities, local requirements. Specific site information. Make planning projections.	Define images, activities, technologies. Determine size, relationship, and types of spaces needed. Determine site requirements. Create a written facilities program.	Develop floor plans, elevations, and site plans for facilities. Review and revise. Research Code compliance issues.	Make final modifications to design.	Complete all construction documents. Submit for Permit	Invite Contractor to bid or negotiate. Make final construction contract arrangements	Review draws by contractor. Review quotes of construction. Finalize punch list items.	Certificate of occupancy. Certificate of substantial completion
Fund Raising Tasks	Make rule of thumb cost projections. Include all project costs including building, site fees, etc.	Compare preliminary budget guess with more detailed programmatic information. Revise.	Refine project costs. Create spread sheet for tracking projections and actuals. Make inquiries about financing opportunities.	Refine project costs. (May ask contractor for assist in construction costs. Determine amount of financing necessary.	Obtain final estimate	Establish final project costs. Include some contingency money	Make draw requests to Very. Keep track of changes to scope and costs	Install permanent financing
Other Tasks	Make rule of thumb projections on the ability of the Church to raise funds. Compare to budget	Begin to inform the congregation about the capital plans and upcoming fundraising drive	Set fund raising goal. Make inquiries to determine the probable financial support of the parishioners	Actively solicit lead gifts. Prepare for and have "kick off" event	Proceed with fund raising drive	Establish balance between project requirements, costs and funds	Keep up with pledges	Keep keeping up with pledges
Product of Phase	Appoint Building, Finance, Fundraising Committees; Appoint Project Committee	Written facilities program as guideline for design	Preliminary drawings and construction cost for facilities	Interview Contractors considered for bidding or negotiating renderings	Final construction documents	Have legal council review construction contract	Purchase fixtures, furnishings and equipment not part of contract	Operating facilities

* This page is a resource page only, indicating tasks and responsibilities usually involved in church construction.

GLOSSARY

Policies and Procedures for Church Expansion

Commission for Congregation Development- A Diocesan Commission that replaces the Mission Development Commission having responsibility for both mission and parish development.

Demography - The statistical study of population trends within such categories as growth, economics, composition (age, sex, ethnic, religious, marital, etc.).

Design Team - The Project Committee (see definition below) augmented by the professional consultants.

Fellowship - A group of people meeting for religious study and worship with an expectation of becoming an Organized Mission of the Diocese.

Impact Fees - Fees assessed by local governments that are to be used to pay for future construction caused by new construction. Transportation, Water and Sewage Fees are currently common. School and Recreational Impact Fees are being considered by some governments.

MAI - Member, Appraisal Institute or more properly, Member of the American Institute of Real Estate Appraisers.

Mission Study Committee - An ad hoc committee formed by the Bishop to consider a specific mission venture and to make recommendations to the Bishop concerning the proposed mission.

Organized Mission - A small congregation of the Episcopal Church formed with the approval of the Bishop and Diocesan Board. The Diocesan Convention then has the authority to admit the Organized Mission into the Diocese at its next meeting.

Pastoral Leader - A lay person licensed to exercise pastoral or administrative responsibility in a congregation under special circumstances.

Project Committee - A committee formed by the Vestry of a church (or a Church Committee) to plan and implement a building program for the church.