

DIOCESAN FINANCE COMMITTEE (DFC) APPROVAL OVERVIEW

Version: October 2024

Value	Approval	Notes
<£2,000	By Parish Priest or equivalent	Expenditure above £2,000 should be discussed with the Parish Finance Committee.
<£7,500	By Parish Priest after formal consultation with PFC.	Consultation to include detail of how Construction Design Management regulations are managed.
<£50,000	Initial permission should be sought to commence design and proceed to tender and then to contract and construction. Permission should also be sought for any feasibility studies.	The DFC may ask to agree the specification of a project and request the appointment of professionals where needed. Permission is likely to be granted by the sub-committee to DFC but all DFC criteria apply.
>£50,000	As above, but permission of Full DFC required.	Building works under JCT (Joint Contracts Tribunal) contract (usually minor works). Professional contract administration is therefore required. Where all the criteria will be met the application may be considered by full DFC without a presentation in person.
Major projects >£150,000	Permission required of Full Trustees.	The ultimate responsibility for all approvals lies with the Trustees.
>£6.5 Million	Permission of Holy See may be required as an Act of Extraordinary Administration	

Note on Professional Services

- Building professionals are required on all except the simplest parish building or repair projects: either a surveyor or architect.
- Appointed by the parish with the agreement of the DFC (usually by sub-committee). Parishioners cannot generally be engaged, but the DFC is prepared to consider particular exceptions, in the case of smaller projects.

- The supervision of projects by building professionals is an important way of ensuring that the major legal and safety issues of projects are addressed and of managing the risk of inadequate work.

Note on Tendering

- Projects in excess of £50,000 must have a professionally led specification and tendering process (not necessarily binding) whose report should accompany the application to Diocesan Finance Committee (DFC).
- Smaller projects of £20k to £50k must be accompanied by a range of 3 quotes.
- Projects under £20k should have 3 quotes. For projects handled at local level a prudent judgement should be made around seeking best value, having regard to the cost and complexity of the works.

DFC Criteria

Is the parish up to date with Health and Safety? Is the quinquennial up to date? Both are essential in order to establish the priority of the project. Does the application demonstrate all of the following:

- The project is strategically sensible and has the support of the Moderator (or Moderator designate) – having been considered by the Deanery clergy.
- That it is being carried out with the support of an appropriate professional team? (Architect/Surveyor or Quantity Surveyor)
- That the specification and design are free from any obvious flaws?
- That it represents good value? (As demonstrated by including tendering or comparative quotes).
- That funds are available? If not, is there any appropriate plan in place? (For projects where funds are not readily available a cash flow projection is expected, identifying how funds will be raised and over a specific time line (ordinarily a maximum of ten years)).
- There are not other matters which take priority (e.g. repairs, statutory H&S items).
- That the opinion of the Art & Architecture Committee been sought?