

The Role of the Archdiocese of Milwaukee Building Commission

Purpose and Scope of the Archdiocese of Milwaukee Building Commission

The Archdiocese of Milwaukee Building Commission (AMBC) serves as an advisory body to the Archbishop of Milwaukee on parish, school and institution construction and renovation projects (i.e.: sanctuary projects, complex projects involving structural alterations to buildings, when permits are required or licensed professionals, etc.), affecting the church in southeastern Wisconsin. Any new construction and/or renovation project by an Archdiocesan parish, school or institution must be submitted to the AMBC for review and be part of a strategic planning effort. A four-step process with corresponding proxy requests needs to be adhered to for these types of projects. The Building Commission Requirements process is outlined in this document.

The AMBC will review the required submitted information for each of the four steps in the proxy process, guide the parish, school, or institution through each step, and recommend action to the Archbishop. Approval of any proxy request is granted by the Archbishop in writing.

Parishes, schools, and institutions first and foremost, should view their facilities in terms of how they can best be used to carry out the mission of the Church. They should prioritize maintenance, both routine and preventive, to prolong the usable life of its facilities. It is inevitable, however, that all facilities will eventually require substantial updating and renovation again so that they will align with their strategic planning efforts. With that in mind, the AMBC requirements and processes are designed to guide parish, school, and institutional leaders through the complexities of a building or renovation project.

Meetings of the Archdiocese of Milwaukee Building Commission

The AMBC meets six times each year – February, April, June, August, October, December.

To request an appointment to present to the AMBC.

- Contact the Chancery Office by phone at: (414) 769-3340.
- Please be aware that there can be a three-month lead time to be included on an agenda.
- Please plan accordingly as the AMBC process can take up to 12 months to complete.
- Ad-hoc consultative meetings with select members of the Building Commission (Finance, Stewardship, Worship Office, etc.), in advance of a full Building Commission meeting, are advised to support the project.

It is required that the Pastor/Administrator/Parish Director and the Director of Administrative Services (or equivalent) attend the meetings, preferably in person, but for special circumstances, we will accommodate a ZOOM attendance.

It is highly recommended to have people who are subject matter experts in key areas of the proposed project (i.e. construction, architecture, or parish leadership) also in attendance at these meetings.

All supporting documents for each individual Proxy Request meeting ***must be submitted to the Chancery Office at least two (2) weeks in advance of the meeting date*** to ensure that the AMBC members will have sufficient time to review the material prior to the scheduled meeting. **There is strict adherence to this two-week policy.** If the required documentation is not received in a timely manner, the AMBC may require a parish to reschedule their appointment to a future AMBC open date.

Members

- Moderator of the Curia, (414) 769-3301
 - Chairperson, Project overview, consult with parishes.
- Executive Director for Parish Planning, (414) 769-3360
 - Project overview, consult with parishes.
- Designee of the Office for Parish and School Financial Consulting, (414) 769-3377
 - Financial reviews, cash flow, parish reserves, debt service
- Designee of the Office for Development, (414) 769-3322
 - Feasibility study, campaign consultants, offertory support
- Designee of the Office for Worship, (414) 769-3349
 - Changes to worship space, liturgical design consultant
- Designee from the Office for Catholic Schools, (414) 758-2251
 - School construction/renovation, academics, technology
- Designee from the Catholic Mutual Group, (262) 255-6906
- Chancery Office, (414) 769-3340
 - An administrative assistant, from the Chancery Office, who serves as the recording secretary and coordinates the scheduling of parishes on the agenda and the distribution of submitted information and materials.

The Archbishop may appoint these and other experts for a three-year, renewable term:

- A pastor/administrator/parish director experienced in building projects.
- An engineering/architectural expert
- A parish financial expert experienced in building projects.
- A construction expert

The Four Step Building & Proxy Process

Step 1 – Lay a strong foundation: Clarity and Organization

- Leadership from the parish, school, or institution, should initiate the discussion.
- Focus on mission, need, concept, scope, cost, and parish/school/institution interest – the “big picture.”
- Project should be based on a “data-informed; mission driven” process.
- Articulate how this furthers the mission of the parish – **first question asked by AMBC.**
- Show how this project aligns with the parish’s strategic planning efforts.
- Pastor and project leaders review AMBC Requirements and Processes.
- Review and complete steps on Proxy A document.

- **Apply for Proxy Request A. – “Request to hire an architect for rough drawings and for a financial and facilities feasibility study.”**

- Schedule an appointment time (30 minutes) to meet with the AMBC to present all documents required for Proxy Request A – purpose is to understand “**high level**” scope of project.

- After Proxy Request A meeting, AMBC will submit their recommendation to the Archbishop for his approval. The Archbishop’s approval should come within two (2) weeks after AMBC submission. If for any reason the AMBC would not recommend Proxy Request A or the Archbishop does not approve Proxy Request A, the chairperson of AMBC will be in contact with the parish/school/institution regarding this decision.

Step 2 – Feasibility studies and organizing the building project

- Once the Archbishop has approved Proxy Request A, Step 2 is to understand if the parish/school/institution can financially support the project. Cost estimates and rough drawings for discussion need to be acquired.
- Two feasibility studies are necessary: 1) Financial Feasibility Study and 2) Facility Feasibility Study.
 - Financial Feasibility Study
 - The Financial Feasibility Study is typically completed by an outside independent consultant (the Archdiocese Development office can provide a list of capable consultants). The study will measure the level of engagement and financial support for the project among parishioners/supporters and provide a case statement for a campaign should the project move forward. The ability and willingness of participation from major donors should be measured in this study. The information provided in this independent study is *invaluable* to the successful completion of the project.
 - In some cases, the Archdiocese of Milwaukee Development office can conduct the feasibility study.
 - The cost of the project will need to be directly tied to the financial findings of this study.
 - Facility Feasibility Study
 - The Facility Feasibility Study is also typically done by an outside consultant (the Moderator's office can provide a list of qualified consultants). This study should include a thorough review of the site, the facilities' condition and recommendations for improvements that should be considered for this project. Note: Investment of money into facilities in poor conditions is more difficult to get approved.
- Feasibility studies are considered valid for **two (2) years**. If the project starts later than two (2) years from the date of study, then a new **Four Step** project approval is required.
- Organizing the building project
 - Concept drawings are required for estimated construction costs used in feasibility studies.
 - Hire an architectural firm for the concept design of the project along with sketches to be used in the feasibility studies. If this project includes worship space/sanctuary renovations, first contact the Designee of the Office for Worship to obtain approval. Once approval has been granted then engagement of a liturgical design consultant is required (the Archdiocese Office for Worship can provide capable consultants).
 - In this step the architect is strictly for rough drawings. They may also be used for construction drawings but there is no contractual or financial commitment to them.

- Best Practices require that reference checks are conducted on all consultants.
- Construction costs
 - Based on the rough drawings, a high-level cost estimate should be obtained from a local, reputable, construction firm that will be used in the feasibility studies.
 - This step should not have to be contractual, but if it is, the contract is for ***cost estimates only and not for final construction.***
- Review and complete steps on Proxy Request B document.
- **Apply for Proxy Request B – “Request to hire an architect for construction drawings”.**
- Schedule an appointment time (30 minutes) to meet with the AMBC to present all documents required for Proxy Request B – purpose is to understand feasibility studies and first look at renderings of the project.
- After Proxy Request B meeting, AMBC will submit their recommendation to the Archbishop for his approval. The Archbishop’s approval should come within two (2) weeks after AMBC submission. If for any reason that the AMBC would not recommend Proxy Request B or the Archbishop does not approve Proxy Request B, the chairperson of AMBC will be in contact with the parish/school/institution regarding this decision.

Step 3– Develop Construction Blueprints, Funding and Financial Plans

- Once the Archbishop has approved your Proxy Request B, Step 3, in the proxy process, requires **focus and attention to detail**. This is when the AMBC carefully reviews the financial, architectural, and construction details of the project. This is for two important reasons: 1) if there are any concerns about the design or financial plans, they will be raised at the preliminary step so they can be addressed or remedied; 2) any design flaws or financial limitations that are not resolved when the parish appears for the final proxy will delay the timeline for the project. Completion of the checklists (included in Proxy Request C) will make certain that all the details have been addressed. A thorough evaluation of the project, at the end of Step 3, usually leads to an easy review at the end of Step 4/Proxy Request D.
- The preliminary work in this step usually requires the most amount of time. This is because the coordination of the various elements is critical to the project moving forward.
- The AMBC can be especially helpful with this Step – the parishes/schools are encouraged to consult with the subject matter experts, on the AMBC, during Step 3.
- Hire an architect for construction drawings.
 - It is required to research and interview three (3) architectural firms.
 - Make sure that the AIA documents are reviewed by Catholic Mutual.
 - The pastor/administrator/parish director/president must sign this contract.
 - Need a Gantt chart for timeline flow.
 - Consult with Catholic Mutual regarding safety and accessibility needs.
 - If a Liturgical Design Consultant is used, it is imperative that you consult with the Office for Worship to ensure the project is approved by the Archbishop.
 - The AMBC does not recommend any particular contractor. We do prefer that you use a separate contractor for the design phase and a separate contractor for the construction phase and to not hire a design/build contractor who does it all.
- Financial considerations
 - Please see detailed “Proxy Request C requirements” that follow.
 - Detailed estimated costs based on complete construction drawings.
 - The estimated costs must include a 15% parish contingency fund (separate from that of the builder/architect contingency fund)
 - If long-term debt will result from the project, there is a 5-year amortization limit on the loan.
 - All projects require a minimum of 50% cash on hand of the total cost (including the contingency fund). In addition, if a financing plan is needed for the remainder of the 50%, the length of the load cannot exceed five (5) years.

- **Please consult with the parish finance office early and often during this step to ensure a good outcome for Proxy Request C.**
- Capital Campaign
 - If a capital campaign is needed to raise funds, a separate proxy approval for the campaign is needed as no campaign can be undertaken without the Archbishop's approval.
 - Two (2) firms must be interviewed to conduct the campaign. The Development Office may be able to run the campaign.
 - References must be checked, and consultation with the Development Office must be undertaken.
- Review and complete all steps on Proxy Request C document.
- **Apply for Proxy Request C – “Request for approval of preliminary plans – financial and construction.”**
- Schedule an appointment time (one hour) to meet with the AMBC to present all the documents required for Proxy Request C – the purpose is to review detailed financials of how the project will be funded, as well as review of detailed construction drawings. The Proxy Request C meeting requires a thorough understanding of all the components (permits, site evaluations, various contractors, times lines, interruptions to routine Parish schedules, financial obligations, etc.) necessary for the successful outcome of the project.
- After Proxy C meeting, AMBC will submit their recommendation to the Archbishop for his approval. The Archbishop's approval should come within two (2) weeks after AMBC Proxy Request C meeting. If for any reason that the AMBC would not recommend Proxy Request C or the Archbishop does not approve Proxy Request C, the chairperson of AMBC will be in contact with the parish/school/institution regarding this decision.

Step 4 – Prepare and Present Final Plans for the Project (You are almost done!!!)

- Once the Archbishop has approved Proxy Request C, Step 4, in the building process involves ***finalizing all aspects of the project***. Final plans are completed, contracts are put out for bid, financing agreements are negotiated and building approvals and permits are secured. Completion of the checklists (included in Proxy Request D) will ensure that all the details have been addressed.
- **Request a financial meeting with the Parish Finance Office prior to the Proxy Request D meeting.**
- Prepare to hire a construction contractor.
 - It is required to research and interview three (3) construction contractors.
 - References must be checked of the preferred contractor.
 - **This contractor cannot be hired until after Proxy D approval.**
- Make sure that the AIA documents are reviewed with Catholic Mutual.
- Review and complete steps on Proxy Request D document.
- **Apply for Proxy Request D – “Request to implement the project”.**
- Schedule an appointment time (30 minutes) to meet with the AMBC to present all the documents required for Proxy Request D – the purpose is to review FINAL financials, FINAL construction drawings and FINAL contracts.
- After Proxy Request D meeting, AMBC will submit their recommendation to the Archbishop for his approval. The Archbishop’s approval should come within two (2) weeks after AMBC submission. If for any reason the AMBC would not recommend Proxy Request D or the Archbishop does not approve Proxy Request D, the chairperson of AMBC will be in contact with the parish/school/institution regarding this decision.

After receiving approval from the Archbishop

- Hire a construction contractor – ***check with Catholic Mutual before signing any contract***
 - For AMBC projects, the general contractor must obtain a ***Performance and Payment Bond***. This requirement needs to be in the bid documents sent out so that the cost of obtaining the bond is included in the bid.
 - Contracts must include completion dates. The start dates should commence upon the receipt of a building permit and conclude on a mutually agreed date. Contract lengths are measured in consecutive calendar dates.
 - When using AIA contract documents, use a lump sum approach contract instead of a cost-plus fee structure.
 - If using a construction manager, use a “guaranteed maximum price,” which has the contractor at risk and not the owner.
 - Do not use volunteer labor for any hazardous work, including work higher than can be reached with a 6’ ladder, any work on scaffolding or using a lift.
 - Do not use volunteer labor for jobs requiring skilled trade certification.
 - The following are appropriate AIA contracts that can be adopted for use:
 - AIA 101 Contract Between Owner and Contractor, Lump Sum
 - AIA 102 Contract Between Owner and Contractor, Cost Plus GMP
 - AIA 133 Contract Between Owner and Construction Manager, Cost Plus GMP
 - AIA 201 General Conditions included per reference with Addenda.
- Any change of more than 10% of the total project or up to \$250,000 must have AMBC approval prior to proceeding with project.
- Submit “as built” blueprints to the parish archives and to the Chancery office.

Three (3) month and Six (6) month Updates – presented after Proxy D

- Narrative submitted to AMBC outlining current status of project.
 - Status of financials – total project cost estimates and monetary draws.
 - Discussion/Rational of changes to final drawings.
 - Discussion/Rational of any contractual issues.
 - Project timeline review/updates.
 - Discussion/Rational of any/all project difficulties.

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**PROXY REQUEST A
REQUEST TO HIRE AN ARCHITECT FOR ROUGH DRAWINGS AND FOR A FINANCIAL AND
FACILITIES FEASIBILITY STUDY**

Parish/Institution: _____ Parish Code: _____

Pastor/Parish Director: _____ Phone: _____

Mailing Address: _____ City/Zip Code: _____

After being involved in an overall parish strategic planning process request permission from the Archbishop to proceed with a parish feasibility study to build or renovate.

Please attach a narrative and pertinent material from the strategic plan.

The following are informed of this request:

☐ Our parishioners: _____ by _____
(Date) Means (bulletins, meetings, etc.)

☐ Dean: _____ Name: _____
(Date)

☐ Neighboring Parishes _____ Parishes: _____
(Date)

☐ Pastoral Council Approved: _____
(Date)

Signatures:

Pastor/Parish Director _____ Date: _____

Secretary Trustee _____ Date: _____

Treasurer Trustee _____ Date: _____

Pastoral Council Chair _____ Date: _____

Please complete this form and mail to:
Archdiocese of Milwaukee – Attention: CHANCERY OFFICE
P.O. Box 070912, Milwaukee, WI 53207-0912

Proxy Request A – 1 of 2

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Approved by Archbishop Grob on March 28, 2025

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**CONTACT INFORMATION
DATE:**

PARISH:	
PARISH CODE:	
ADDRESS:	
PASTOR	
- TELEPHONE NUMBER	
- EMAIL	
DIRECTOR OF ADMINISTRATIVE SERVICES	
- TELEPHONE NUMBER	
- EMAIL	
TRUSTEES	
- TRUSTEE SECRETARY	
- TRUSTEE TREASURER	
PASTORAL COUNCIL CHAIR	
PROJECT CONTACT PERSON	
- TELEPHONE NUMBER	
- EMAIL ADDRESS	
IS THIS PROJECT INCLUDED IN YOUR LOA CASE STATEMENT?	If YES , please include a copy of your LOA Case Statement.

BRIEF DESCRIPTION OF PROPOSED PROJECT:

***RETURN WITH SUBMISSION OF BUILDING COMMISSION PROXY REQUEST A**

Proxy Request A – 2 of 2

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**PROXY REQUEST B
REQUEST TO HIRE AN ARCHITECT FOR CONSTRUCTION DRAWINGS**

Parish/Institution: _____ Parish Code: _____

Pastor/Parish Director: _____ Phone: _____

Mailing Address: _____ City/Zip Code: _____

We request permission from the Archbishop to proceed with hiring an architect and developing financing plans.

Please attach narrative and pertinent documents (see page 2 for a list of details that are required.)

The following are informed of this request:

<input type="checkbox"/> Our parishioners:	_____	by	_____
	(Date)		Means (bulletins, meetings, etc.)
<input type="checkbox"/> Dean:	_____	Name:	_____
	(Date)		
<input type="checkbox"/> Neighboring Parishes	_____	Parishes:	_____
	(Date)		
<input type="checkbox"/> Pastoral Council Approved:	_____		
	(Date)		

Signatures:

Pastor/Parish Director _____ Date: _____

Secretary Trustee _____ Date: _____

Treasurer Trustee _____ Date: _____

Pastoral Council Chair _____ Date: _____

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Proxy Request B – 1 of 2

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Approved by Archbishop Grob on March 28, 2025

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**REQUIRED DOCUMENTATION FOR
PROXY REQUEST B**

1. Project Narrative – general explanation of the proposed project, please include:
 - a. A copy of the Feasibility and Facilities Studies. If rough drawings were done in the feasibility and/or facilities study, please submit them. ☐
 - b. Approximately how many square feet is this project:
2. The following architects were interviewed:
 - a. First Firm:
 - b. Second Firm:
 - c. Third Firm:
3. The proposed Architect is:
4. The proposed liturgical design consultant is:
5. The AIA document revisions have been reviewed. ☐
6. Financial information needed:
 - a. Number of current parish members (per Status Animarum submitted):
 - b. Current debt (make sure it ties to financial statements submitted):
 - c. Estimated cost of the project:
 - d. Funds available on balance sheet to start the project:
 - e. If necessary, financial plan to secure needed funds through a capital campaign with a goal of:
 - f. Expected new funds or pledges to be secured before the final approval of the project:
 - g. Use of current parish resources to complete the project in the amount of:
 - h. Include a balance sheet as of the last closed month and highlight cash/investment accounts that will be used to pay for this project. ☐
 - i. Include a YTD income statement for the current fiscal year and the income statement for the previous fiscal year. ☐

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**PROXY REQUEST C
REQUEST FOR APPROVAL OF PRELIMINARY PLANS – FINANCIAL AND CONSTRUCTION**

Parish/Institution: _____ Parish Code: _____

Pastor/Parish Director: _____ Phone: _____

Mailing Address: _____ City/Zip Code: _____

We request permission from the Archbishop to approve preliminary plans for building or renovation project. **Please attach a narrative and pertinent material (see page 2 for a list of details that are required.)**

The following are informed of this request:

☐ Our parishioners: _____ by _____
(Date) Means (bulletins, meetings, etc.)

☐ Dean: _____ Name: _____
(Date)

☐ Neighboring Parishes _____ Parishes: _____
(Date)

☐ Pastoral Council Approved: _____
(Date)

Signatures:

Pastor/ Parish Director _____ Date: _____

Secretary Trustee _____ Date: _____

Treasurer Trustee _____ Date: _____

Pastoral Council Chair _____ Date: _____

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P.O. Box 070912, Milwaukee, WI 53207-0912

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**REQUIRED DOCUMENTATION FOR
Proxy Request C**

Both Proxy Request C and Proxy Request D require mostly the same information. The main difference is that Proxy Request C is ***draft or estimated figures***, while Proxy Request D must have final figures. It should be noted that this list is not comprehensive and other financial information may be requested.

- ☐ 1. Project narrative, including a description of the full project scope.
- ☐ 2. Set of architectural and construction drawings in 12x18" or 18x24" format.
- ☐ 3. Detailed breakdown of estimated project costs including 15% contingency.
- ☐ 4. Proposed AIA contracts with builders (include Catholic Mutual Addendum/Changes to AIA).
- ☐ 5. All permits, licenses and government approvals are to be obtained.
- ☐ 6. Financial Documents Needed:
 - Budget vs Actual Income Statement for the previous fiscal year.
 - Budget YTD vs Actual YTD Income Statement.
 - Balance Sheet YTD – Highlight cash/investment accounts used to pay for this project.
 - Balance Sheet Year over Year.
 - Itemized list of all construction expenses. The estimated costs must include a 15% PARISH (not contractors) contingency.
 - 3-5 Year Operational Budget Projection – this budget forecast is especially important if the parish will be taking out debt that will be paid down with funds from operations. Make sure that parish/school/institution budget includes increased building maintenance costs for the new facility.
 - Cash Flow Schedule for the next 10 years showing debt payback and reduction.
 - If the parish/school/institution will be taking on debt, a letter from the lending institution is needed. It should note the terms of the note. Parishes/schools/institutions should negotiate on any prepayment penalties. Parishes/schools sometimes have the ability to pay off debt sooner than planned (due to bequests or other unbudgeted income) but cannot make the payment without incurring a fee.

OTHER TIPS

- Ask for Help. Please don't hesitate to contact any member of the AMBC with questions. They are available to review information at any point.
- Schedule an appointment with the Parish Finance Office ***one month prior*** to Proxy Request C meeting.
- Make sure figures correlate. For example, if a figure is included in a narrative, it must tie to a corresponding financial statement.

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**PROXY REQUEST D
REQUEST FOR PROXY TO IMPLEMENT BUILDING OR RENOVATION PROJECT**

Parish/Institution: _____ Parish Code: _____

Pastor/Parish Director: _____ Phone: _____

Mailing Address: _____ City/Zip Code: _____

We request permission from the Archbishop to implement our building or renovation project. Below is a brief description of the proposed project. **Please attach a narrative and pertinent material (see page 2 for a list of details that are required.)**

The following are informed of this request:

<input type="checkbox"/> Our parishioners:	_____	By _____	_____
	(Date)		Means (bulletins, meetings, etc.)
<input type="checkbox"/> Dean:	_____	Name: _____	_____
	(Date)		
<input type="checkbox"/> Neighboring Parishes	_____	Parishes: _____	_____
	(Date)		
<input type="checkbox"/> Pastoral Council Approved:	_____		
	(Date)		

Signatures:

Pastor/ Parish Director	_____	Date: _____
Secretary Trustee	_____	Date: _____
Treasurer Trustee	_____	Date: _____
Pastoral Council Chair	_____	Date: _____

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Proxy Request D – 1 of 2

**BUILDING COMMISSION
ARCHDIOCESE OF MILWAUKEE**

**REQUIRED DOCUMENTATION FOR
PROXY REQUEST D**

Both Proxy Request C and Proxy Request D require the same information. The main difference is that Proxy Request C is draft or estimated figures, while Proxy Request D must have ***final figures***. It should be noted that this list is not comprehensive and other financial information may be requested.

- ☐ 1. Project narrative, including a description of the full project scope.
- ☐ 2. Set of architectural and construction drawings in 12x18" or 18x24" format.
- ☐ 3. Detailed breakdown of estimated project costs including 10% contingency
- ☐ 4. Proposed AIA contracts with builders (include Catholic Mutual Addendum/Changes to AIA).
- ☐ 5. All permits, licenses and government approvals are to be obtained.
- ☐ 6. Financial Documents Needed:
 - Budget vs Actual Income Statement for the previous fiscal year.
 - Budget YTD vs Actual YTD Income Statement.
 - Balance Sheet YTD – Highlight cash/investment accounts used to pay for this project.
 - Balance Sheet Year over Year.
 - Itemized list of all construction expenses. The estimated costs must include a 10% PARISH (not contractors) contingency.
 - 3-5 Year Operational Budget Projection – this budget forecast is especially important if the parish will be taking out debt that will be paid down with funds from operations. Make sure that parish/school/institution budget includes increased building maintenance costs for the new facility.
 - Cash Flow Schedule for the next 10 years showing debt payback and reduction.
 - If the parish/school/institution will be taking on debt, a letter from the lending institution is needed. It should note the terms of the note. Parishes/schools/institutions should negotiate on any prepayment penalties. Parishes/schools sometimes have the ability to pay off debt sooner than planned (due to bequests or other unbudgeted income) but cannot make the payment without incurring a fee.

OTHER TIPS

- Ask for Help. Please do not hesitate to contact any member of the AMBC with questions. They are available to review information at any point.
- Schedule an appointment with the Parish Finance Office ***one month prior*** to Proxy Request D meeting.
- Make sure figures correlate. For example, if a figure is included in a narrative, it ***must tie*** to a corresponding financial statement.