

Diocese of Winona-Rochester Proxy Request Worksheet

Info	Parish, School, or Cemetery Name: _____
	City: _____
	Pastor Name: _____
	Contact Name: _____
	Contact Email: _____

Description	Type of Proxy Requested (place X) : _____ Fundraising _____ Project
	Project title: _____
	Project Description: _____ _____

Project Cost	Is contract, estimate, quote, or other documentation attached? (Yes/No) _____ (If no, please refrain from submitted proxy until that information is available to submit.)														
	Estimated Cost: _____ NOTE: In order to proceed with a project, you need to have 75% of the funds in hand and 25% in documented pledges.														
	Do you have the funding to proceed with the project? (Yes/No) _____														
	Where are Project Funds located?														
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Amount</th> <th style="width: 40%;">Gen. Ledger Acct #</th> <th style="width: 40%;">Acct Name</th> </tr> </thead> <tbody> <tr> <td>Cash Source #1</td> <td></td> <td></td> </tr> <tr> <td>Cash Source #2</td> <td></td> <td></td> </tr> <tr> <td>Cash Source #3</td> <td></td> <td></td> </tr> <tr> <td>Pledges Receivable</td> <td></td> <td></td> </tr> </tbody> </table>	Amount	Gen. Ledger Acct #	Acct Name	Cash Source #1			Cash Source #2			Cash Source #3			Pledges Receivable	
Amount	Gen. Ledger Acct #	Acct Name													
Cash Source #1															
Cash Source #2															
Cash Source #3															
Pledges Receivable															
Was this listed as a CMA Project (Yes / No)? _____ If Yes, What CMA Year? _____															

Approvals	Was the this proxy request presented to and reviewed by:
	Parish Finance Council (Yes / No) ? _____ Meeting date: _____
	Parish Pastoral Council (Yes / No) ? _____ Meeting date: _____
	Has a Proxy Request letter been drafted to Bishop Robert Barron asking for the proxy votes of the Bishop and Vicar General? (Yes/No) _____
	Have you scheduled a meeting of the Parish Civil Corp. in order to vote the proxies received from the Bishop and Vicar General? (Yes/No) _____
	Date of Meeting: _____
	Other information you wish to provide to expedite the Proxy Request: _____ _____
Preparer's Signature: _____ Date: _____	
Preparer's Contact Information: _____	

Notes	* Except for schools, all project fundraising is subject to diocesan assessment unless the project cost is greater than \$120,000 or relates to projects which are listed as a project on your parish's CMA goal sheet.
	* Prior to signing contracts, the contracts need to be reviewed by Ryan Christianson, the diocesan risk management officer, to ensure that the general contractor has adequate levels of insurance coverage in place.
	* All applicable laws pertaining to the removal of asbestos must be complied with.