

**All Non-Lease/Non-Sale Property Checklist**  
**(e.g., easements, rights of way, etc.)**  
**(3 pages)**

Necessary Action/Documentation Provided	Date to Property Manager or Committee
<p><b>1. Contact the Diocesan Property Manager and Provide him/her with documents identified in this checklist</b></p> <p>No less than one week prior to the monthly Property Subcommittee meeting (usually held on the 1st Thursday of the month) to inform him or her of the proposed transaction and the Congregation's need for Diocesan approval.</p>	
<p><b>2. Get in touch with the Chair of the Diocesan Property Subcommittee</b></p> <p>Tell him or her that the Congregation intends to seek Diocesan approvals of a real estate transaction and provide any documents identified in this check list or arrange to have them delivered to him/her by the Property manager.</p>	
<p><b>3. Provide him/her with a written Resolution by the Vestry</b></p> <p>This Resolution must authorize the property transaction and includes the reasons why the transaction is in the best interests of the Congregation's mission and ministry.</p>	
<p><b>4. Intended use of any proceeds from the transaction</b></p> <p>If not included in the vestry resolution, a Parish's written statement regarding the intended use of the proceeds. This statement must be approved by its vestry.</p>	

<p><b>5. Transaction Price is Fair</b></p> <p>Materials to show that that the price received by the Congregation in exchange for the restriction or limitation on its property is fair. We appreciate that in some instances, this may be difficult to do, so an early conversation with the Property Manager and the Property Subcommittee may assist the parish in identifying the extent to which it must gather information to value a transaction that may not be susceptible to traditional valuation methods.</p>	
<p><b>6. Less than fair value</b></p> <p>If the property transaction is not in exchange for fair value, or fair value is difficult to ascertain, include a statement approved by the vestry as to why the transaction serves the best interests of the parish, and its mission even in the absence of a traditional valuation.</p>	
<p><b>7. Proposed Document (e.g., easement, right of way, etc.)</b></p> <p>Provide a copy to the Diocese and, if not already in the agreement, provide the address and the identity of any person or entity which will initially benefit from the alienation.</p>	
<p><b>8. Photographs and metes and bounds drawings of any property to be alienated</b></p>	
<p><b>9. Parish Financial Information</b></p> <p>Most recent annual budget, parochial report and audit, and treasurer's report.</p>	
<p><b>10. Deed</b></p> <p>Provide a copy of the deed relating to the property which is subject to the alienation and confirm that it does not contain any restrictions requiring it to be used for religious purposes.</p>	

**Questions to be submitted on this checklist**

	<b>Yes (add details)</b>	<b>No</b>
a. Does the property need to be deconsecrated?		
b. Were documents relating to the alienation reviewed by an attorney and, if so, who?		
c. Did counsel recommend changes to the agreement which were not accepted by the person or entity paying for the property rights?		
d. Does the purchaser has any affiliation with the Congregation or one of its members?		
e. Was an effort made to limit the length of the property alienation (e.g., a request for an easement, which is permanent and runs with the land, could potentially be limited in time, etc.)		