

## PROJECT PLANNING

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### NEW CONSTRUCTION, RENOVATIONS, REPAIRS and MAINTENANCE

#### I. PLANNING PHASE (Identify a Project)

1. The pastor establishes a **Parish Planning and Building Committee (PPBC)**. The membership of the PPBC may be generic or project specific, or a project specific sub-committee. Normally the complexity of the project will determine the specific skills needed to staff the PPBC or a sub-committee. The Pastor should seek volunteers who possess the necessary skills relevant to new construction, renovations, repairs and maintenance or the type of project envisioned. The Pastor forwards the list of the PPBC members (to include addresses, phone numbers and e-mail addresses) to the Diocesan Planning and Building Commission (DPBC) Chair.
2. The PPBC conducts a yearly Building Assessment using the BUILDING ASSESSMENT WORK SHEET FOR THE 5 YEAR Plan found in Volume I and develops a prioritized 5 Year Plan, using the 5 Year Plan Assessment Worksheet found in Volume I. The project planning process begins when the Pastor selects a project.
3. When a Architectural/ Consultant/Construction project is identified that is estimated over \$20,000, the Pastor forwards a Letter of Intent to the Bishop with a copy to the Chair of the DPBC outlining the intent and justification for the project. Sample Letters of Intent are provided later in Volume II.
4. Following a favorable review of the Letter of Intent by the Bishop, the Pastor and the PPBC begin the project design process and the development of a Scope of Work for bid. When renovation or construction involves a worship space the Diocese will assign a Liturgical Representative to attend the PPBC meetings as necessary.
5. Primary Design Considerations
  - a. When a Worship space is part of the project, compliance with the [Built of Living Stones: Art, Architecture and Worship](#) guidelines, issued by the United States Conference of Bishops, provides the appropriate direction. The Diocese will assign a Liturgical Representative and the Office of Worship will review the plans that affect the Worship space. Additionally, the Parish may, with approval of the Bishop, hire a professional liturgical consultant, to coordinate with the Diocesan Liturgical Representative. Moreover, the design process should respect the character of the local worshipping community.
  - b. The Bishop will review and approve all Worship space plans prior to construction, renovation or major repairs and maintenance.
  - c. The design process will comply with federal and local laws and be sensitive to the needs of people with disabilities. This sensitivity is not limited to physical access and applies to the selection of art, lighting, video, space utilization, acoustics as well as the use of modern technology.

5. Project Description/Program/Scope of Work

a. The PPBC develops a Project Description (sample Project Description/Program/Scope of Work provide later in Volume II). The project Description/Program/Scope of Work should ***include every possible consideration*** with regard to its operation or overall intent. It is prudent to include every relative concern/item, adding concerns/item later in the process can become expensive.

b. A Project Description/Program/Scope of Work with site plan is developed detailing all objectives, spaces, services (i.e. telephone, sound, lighting, data {modern technology}, utilities, etc.), equipment (new and existing), special finishes, furniture and spatial relationships. The Project Description/Program/Scope of Work forms the basis of the parish's expectations and goals for the completed project. The PPBC and the various ministries and parishioner groups, should review and contribute to the development of the Project Description. In the case of technically complex projects, an outside Architect/Consultant is usually engaged to prepare the Project Description/Program/Scope of Work in sufficient detail to develop a biddable Scope of Work for the basis of a Request for Fee Proposal (RFP) to a contractor. If an Architect/Consultant is required, the PPBC issues an RFP and follows the procedures under Section II. Request for Fee Proposal Phase,(RFP).

c. Develop Project Description/Program/Scope of Work Content:

1. Brief project statement
2. Statement of purpose and need for the project
3. Context/Background of the project:
  - a. Describe how project supports the overall goals of the Parish
  - b. Describe how project supports projected parish demographics and service requirements.
  - c. What - if any - pre project requirements need to be completed prior to this project?
4. Project Components (detailed description with site plan attached):
  - a. New Construction
  - b. Maintenance Improvements/Upgrades
  - c. Demolition
5. Issues and Concerns Identified:
  - a. Physical (e.g. ADA, lack of buildable space, existing infrastructure)
  - b. Permitting
  - c. Construction-phase impact on religious services Parish/Facility operations
6. Pre-bid advice provided by professional architects, consultants, contractors, engineers during development of project description
7. Estimated Project Schedule
8. Order of Magnitude Project Costs
9. Site Plans:
  - a. Existing conditions: buildings, utilities, traffic patterns
  - b. Proposed changes to the overall facility

d. On completion of Project Description/Program/Scope of Work. The PPBC will provide all the Stakeholders of the Parish with a participatory opportunity to voice their opinions with regard to the Project Description/Program/Scope of

Work projected schedule and estimated costs. It is prudent for the Parish Pastoral Council/Parish Finance Committee to attend these presentations.

e. Upon approval by the PPBC, Parish Finance Council and Parish Pastoral Council, the Parish will proceed to developing the Request for Fee Proposal.

## **II. REQUEST FOR FEE PROPOSAL PHASE (RFP)**

### **A. FOR ARCHITECTS AND CONSULTANTS**

1. The PPBC issues RFPs for the project through a sealed bid process to three or more qualified professionals (i.e., architects, consultants).
2. PPBC develops a RFP. (Sample RFP letter and Bid List provided later in Volume II)
  - a. RFP Package contains:
    - RFP Invitation Letter
    - Project Description and Scope of Work
    - Bid submittal information:
      - Due date, time and place
      - Format: hardcopy, original signature. No e-mail or fax submissions.
    - A blank Bidders Cost Proposal form (provided later in Volume II)
    - Drawings, specifications and product data sheets if appropriate
    - Supplemental Conditions and House Rules (specific to each parish)
    - Blank Contract/Services agreement for information and Insurance requirements, located at;  
<http://www.catholichawaii.org/staticpages/index.php?page=Facilities>
  - b. PPBC researches prospective bidders for experience in comparable work and reputation. Identify a minimum of three qualified bidders.
  - c. The Pastor forwards an RFP to the perspective bidders.
  - d. Pre-Bid: The pastor and PPBC conduct an onsite pre bid conference with the bidders and answers any questions.
  - e. Bid Receipt: Sealed bids are date stamped when received. (No faxed copies or unsealed bids should be accepted.)
  - f. Bid Opening procedure:
    1. Establish Bid Opening Committee: The Pastor, members of the PPBC, and a member of the Parish Finance Council
    2. The sealed bids are opened, initialed and dated by each member.
  - g. Select Architect/Consultant
    1. The Pastor evaluates bids with the PPBC and selects the preferred bid, based on cost, comparable experience and recommendations by previous customers. It is normal Diocesan practice for the Pastor to select the low bidder.
    2. If there is a question regarding the facts (exclusions and substitutions) and pricing provided by the lowest bidder, the PPBC arranges a meeting with the low bidder and the originator of the Project

Description to insure that all elements of the Scope of Work are included in the bid.

3. Provide the winning bidder with one original and two copies of the standard Diocesan Contract for professional services;  
<http://www.catholichawaii.org/staticpages/index.php?page=Facilities>
4. Projects over \$20,000 should be presented to the DPBC for review.
5. The winning bidder forwards a signed original contract and two signed copies to the Pastor. The Pastor forwards the original and two signed copies to the Facilities Services Manager for further processing.
6. The Facilities Services Manager forwards the original and two copies of the signed contract to the Diocesan Attorney for review, then onto the Bishop for approval and signature.
7. Upon final approval by the Bishop, the Pastor forwards a signed contract to the winning bidder. The Pastor notifies the other bidders by letter that they did not win the bid.

## **B. FOR CONTRACTORS**

1. The PPBC issues RFPs for the project through a sealed bid process to three or more qualified Contractors
2. PPBC develops a RFP. (Sample RFP letter and Bid List provided later in Volume II)
  - a. RFP Package contains:
    - RFP Invitation Letter
    - Project Description and Scope of Work
    - Bid submittal information:
      - Due date, time and place
      - Format: hardcopy, original signature. No e-mail or fax submissions.
    - A blank Bidders Cost Proposal form (provided later in Volume II)
    - Drawings, specifications and product data sheets if appropriate
    - Supplemental Conditions and House Rules (specific to each parish)
    - Blank Contract/Services agreement for information and Insurance requirements, located at;  
<http://www.catholichawaii.org/staticpages/index.php?page=Facilities>
  - b. PPBC researches prospective bidders for experience in comparable work and reputation. Identify a minimum of three qualified bidders.
  - c. The Pastor forwards an RFP to the perspective bidders.
  - d. Pre-Bid: The pastor and PPBC conduct an onsite pre bid conference with the bidders and answers any questions.
  - e. Bid Receipt: Sealed bids are date stamped when received. (No faxed copies or unsealed bids should be accepted.)
  - f. Bid Opening procedure:
    1. Establish Bid Opening Committee: The Pastor, members of the PPBC, and a member of the Parish Finance Council with the Architect or Consultant responsible for the Construction Documents

2. The sealed bids are opened, initialed and dated by each member.
- g. Select Contractor
1. The Pastor evaluates bids with the PPBC and selects the preferred bid, based on cost, comparable experience and recommendations by previous customers. It is normal Diocesan practice for the Pastor to select the low bidder.
  2. If there is a question regarding the facts (exclusions and substitutions) and pricing provided by the lowest bidder, the PPBC arranges a meeting with the low bidder and the Architect/Consultant to insure that all elements of the Scope of Work are included in the bid.
3. Provide the winning bidder with one original and two copies of the standard Diocesan Contract for Construction;  
<http://www.catholichawaii.org/staticpages/index.php?page=Facilities>
  4. Projects over \$20,000 should be presented to the DPBC for review.
  5. The winning bidder forwards a signed original contract and two signed copies to the Pastor. The Pastor forwards the original and two signed copies to the Facilities Services Manager for final processing.
  6. The Facilities Services Manager forwards the original and two copies of the signed contract to the Diocesan Attorney for review , then onto the Bishop for approval and signature.
  7. Upon final approval by the Bishop, the Pastor forwards a signed contract to the winning bidder. The Pastor notifies the other bidders by letter that they did not win the bid.

### **III. DESIGN PHASE AND FINANCIAL PLAN**

1. At the conclusion of the design phase, the PPBC schedules a presentation for all the Parishioners/Stakeholders of the Parish to provide them with an opportunity to voice their opinions with regard to the conceptual design.
  - a. Site Plan of the entire property
  - b. A brief narrative elaborating on the approved Program/Scope of Work
  - c. Assurance that the design has the approval of the appropriate Parish Finance and Pastoral Councils, Boards and Committees.

The Financial Plan will encompasses the following:

- the sources of funds
- a strategy for payment along with a payment schedule for the project
- total amount of Parish savings
- total amount in the Parish building fund, if established
- monies raised for this particular capital improvement
- parish statistics on the average number of adults in attendance for Saturday/Sunday Liturgy
- average weekend collection

The Diocesan Business Office is prepared to assist the Parish Finance Committee and the PPBC in the preparation of its' Financial Plan.

#### **IV. SCHEMATIC DESIGN PHASE**

1. For the Pastor and PPBC the Schematic Design Phase is the most critical review of the project. For it is at this stage that the Pastor and PPBC determine if the Architect/Consultant fully grasped the Scope of Work. The Schematic Design drawings and specifications should be reviewed in detail to insure that the approved Program/Scope of Work has been faithfully incorporated in the design. Now is the time to clarify the drawings, the Program/Scope of Work and make modifications. The project should not proceed until the Schematic Design is complete to the satisfaction of the Pastor and the PPBC. Changes to the Schematic Design are far less costly than changes

2. After review and approval by the Pastor, the PPBC arranges for a detailed review by the DPBC;

- a. Plan view drawings
- b. Available material samples and finishes
- c. Landscaping concepts
- d. Sound system specifications
- e. Lighting fixture specifications
- f. ADA considerations
- g. Parking including egress and ingress routes
- h. Infrastructure consideration
- i. Filings with the City County and State

3. After a favorable review by the DPBC of the Schematic Design Drawings, the Parish presents the project to the Bishop for his review. This is the most critical step in the planning process because it sets the final Program/Scope of Work and design intent along with recommended material selections and finishes.

4. With the Bishop's approval, the Architect may proceed with the Design Development Phase. The Consultant may proceed to Bid Documents

#### **V. DESIGN DEVELOPMENT PHASE**

1. After reviewing the options raised at the end of the Schematic Design Phase, the design work continues to define -- through plans, elevations and sections -- the size of rooms, types of materials, and the exact placement of the building. In addition, there are perspective sketches of details, as well as more refined perspectives of the project as a whole.

2. During this phase, the whole building is presented as a system, including specific construction issues, which may affect the final project. From this phase, a fairly accurate cost of construction may be obtained from the prepared drawings.

## **VI. CONSTRUCTION DOCUMENTS PHASE**

1. The Architect/Consultant proceeds with developing biddable Construction Documents.
2. The PPBC with the Architect/Consultant bids the project (sample Bid Letter page 19 and 20). The Bid procedures outlined in Paragraph II are provided as a guide.
3. Submitted sealed Construction Bids are reviewed by the Pastor and PPBC, Architect/Consultant and the Parish Finance Committee to insure the Construction costs are within budget and there is sufficient contingency to cover unforeseen circumstances. (Owners Contingency is normally 7% to 10% of the construction cost.) The Bid Opening Procedure is noted in Paragraph II. 2. f.
4. If the project is over budget, the Pastor, PPBC, Architect/Consultant meet with the lowest bidder, to Value Engineer the construction costs to determine costs savings while maintaining the approved intent of the project. Resulting changes that alter the original intent of the project must be reviewed by the DPBC before proceeding. If significant changes are made to the Scope of Work the Pastor and PPBC may consider rebidding the Project.
5. If the project remains over Budget, notify the DPBC.
6. Forward three signed originals of the Standard Diocesan Construction Contract to Facilities Services for Legal review and final signature by the Bishop.
9. The Pastor announces the winning bidder.
10. Two signed contracts are returned to the Pastor for distribution; one copy to the Contractor and the Parish retains one copy.

## **VII. CONSTRUCTION PERIOD**

1. If appropriate the Pastor arranges for the a Ground Breaking ceremony.
2. The PPBC arranges for one member to attend the Contractor's weekly job site meetings for the purpose of communicating parish concerns and activities as well as considering the Contractor's issues with regard to impediments that may affect the construction schedule or construction costs.
3. Change Proposals, any amount, (refer to pages 22 and 23). The Contractor submits a Change Proposal to the Architect/Consultant for review and comment. The Architect/Consultant and contractor in consultation with the Pastor and PPBC review the Change Proposal. An approved Change Proposal becomes a Change Order and authorizes the Contractor to proceed with the work. Moreover, it either adds or deducts costs to the Project Budget. Changes to the Construction Budget must be forwarded to the Diocesan Facilities Services Office as they occur. Any changes that

affect the Worship space must be approved by the assigned Liturgical Representative and the Bishop. Change Proposals over \$10,000 must be forwarded to the DPBC for approval. (The attached Change Order Proposal form is provided for managing Change Orders.)

4. The pastor and the PPBC along with Architect/Consultant are responsible for the administration and supervision of the construction contract, unless a Project Manager has been hired.
5. A Certificate of Insurance is forwarded to the DPBC to insure that the proper insurance coverage for the project is provided.
6. The Pastor receives one complete set of "As Built" Construction Documents to include record drawings and specifications as well as all warranties and guarantees and a second complete set is submitted to the DPBC for permanent storage in the Diocesan Archives. The Parish maintains the original Record set.

## **VIII. GRAND OPENING PHASE**

1. The Blessing and Celebration of the completed project is scheduled with the Bishop's office by the pastor. Contact the Office of Worship if the blessing involves the Rite of Dedication or Rededication of a Church by the Bishop.
2. Any adjustments or renovations made to a Church or its worship space following dedication or rededication are to be accomplished in consultation with the Office of Worship.