

PLANNING PROCESS FOR PARISHES

CHECK LIST

**DATE
COMPLETED**

PLANNING

- _____ The Pastor establishes a **Parish Planning and Building Committee (PPBC)**
- _____ PPBC conducts yearly Building Assessment Work Sheet for the 5-Year Plan, see Volume I.
- _____ Identify Projects
- _____ Develop 5-Year Plan matrix, refer to Volume I and forward to the Bishop for approval
- _____ Forward a Letter of Intent to the Bishop from the Pastor via the Chair of the DPBC, outlining the intent and justification for the project.
- _____ When the project involves a new church, renovation or repairs and maintenance that involve a Worship space, refer to the Built of Living Stones: Art, Architecture, and Worship. The Diocese will assign a liturgical representative. The Bishop has final approval with regard to a new or modified Worship space.
- _____ The design process must be sensitive to the selection of art, lighting, video, flexibility of space, acoustics and accessibility for persons with disabilities Building Green and Sustainability
- _____ The PPBC develops a Project Description/Program/Scope of Work,

REQUEST FOR FEE PROPOSAL

- _____ When the PPBC's Program/Scope of Work is approved, by the Pastor utilize a standard biddable Diocesan Architectural/Consultant/Construction contract or Service Agreement.
- _____ The PPBC bids the project.
- _____ The PPBC and Pastor select a winning bidder
- _____ The wining bidder completes and signs the standard Diocesan Architectural/Consultant/Construction Contract and forwards it to the Pastor for signature. The Pastor forwards the approved contract for processing to Facilities Services for legal review and signature by the Bishop.

DESIGN PHASE

- _____ At the end of the Design Phase, the PPBC schedules a presentation with the appropriate Parish ministries, councils and committees. It is important that all stakeholders associated in whatever degree are supporting the project
- _____ The Diocesan Business Office is prepared to provide assistance to the parish Finance Committee and the PPBC in the preparation of its financial plan.
- _____ For consultants the approved Design Phase may lead directly to Construction documents.
- _____ For Architects upon approval of the Design Phase the project moves to the Schematic Design Phase

SCHEMATIC DESIGN PHASE

- _____ The PPBC and the appropriate Parish ministries, councils and committees review the Schematic Design drawings and specifications in detail.
- _____ Upon completion of the Schematic Design Phase, the PPBC arranges for a presentation and review by the DPBC
- _____ Prepare a detailed Financial Plan for review by the Diocesan Business Office.
- _____ The Chair of the DPBC will forward comments to the Bishop. The Bishop will forward a letter with comments to the
- _____ The PPBC provides a sample of the standard Diocesan Construction Contract to the Architect/Consultant for inclusion with the Construction bid package.

DESIGN DEVELOPMENT

- _____ Complete the Drawings and Specifications for final approval by the Parish

CONSTRUCTION DOCUMENTS PHASE

- _____ The Architect/Consultant proceeds with developing biddable Construction Documents.
- _____ The PPBC with the Architect/Consultant bid the project.
- _____ Submitted sealed Bids are reviewed by the PPBC, Architect/Consultant, the Parish Finance Committee and Pastor to insure the proposed projects costs are within budget.
- _____ If necessary, Value Engineer the Project costs to within budget
- _____ If Value Engineering results in a significant change in scope, consider rebidding the project.
- _____ If the project remains over budget, the Parish may notify the DPBC.

_____ The winning bidder is announced by the Pastor.

_____ Forward three signed Construction Contracts to Facilities Services for processing, legal review, and final approval and signature by the Bishop. Distribute the returned signed copies, one copy to the Contractor, and retain one copy at the Parish

CONSTRUCTION PERIOD PHASE

_____ If the Project warrants it, the Pastor arranges for the appropriate Ground Breaking and commencement of construction, ceremony.

_____ The PPBC arranges for a member to attend the Contractor's job site meetings for the purpose of communicating parish concerns and activities as well as considering the Contractor's concerns with regard to impediments that may affect the construction schedule.

_____ Change Proposals (any amount); Follow the Change Proposal procedure.

_____ The pastor and the PPBC along with Architect/Consultant are responsible for the administration and supervision of the construction contract.

_____ Forward a complete set of "As Built" Construction Documents to include record drawings and specifications to the DPBC. The Parish retains the Record set

_____ Notice of Completion and Certificate of Occupancy are forwarded to the DPBC and the Diocesan Business Office.

GRAND OPENING PHASE

_____ If appropriate a Blessing and Celebration are 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.

_____ 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.