

Diocese of Dallas

Construction or Renovation over \$150,000 - Process Flowchart

Initial Consultation

1. Pastor or President reviews project with appropriate internal boards / councils (may include introductory schematic design).
2. Pastor or President contacts the Diocesan Bishop in writing for approval of the project (and capital campaign if appropriate). (FORM CR-REQ)
3. Bishop consults with COO and CFO (and Presbyteral Council if new church or at Bishop's discretion).
4. Bishop informs Pastor or President in writing to move to next phase (copies to OCRE, COO, CFO and Sacred Places, if applicable). (FORM CR-APP1)
5. If project > \$750k, Bishop informs Diocesan Finance Council and College of Consultors of decision.

Review Process

6. OCRE contacts Entity to understand concept and informs entity about architect.

*Entity responds with current drafts of schematics or any other design document created, as well as evidence of city or local approvals.

*Entity may hire project manager and other professionals as guided by OCRE.

*OCRE provides 1-page recap of approval.

7. Diocesan CFO contacts Entity to understand funding.

* Entity provides Parish Finance Council written approval.

* If financing required, Diocesan CFO reviews financials.

* If financing required > \$750k, obtain consent from Diocesan Finance Council and College of Consultors.

* CFO provides 1-page recap of approval to OCRE.

8. OCRE notifies Sacred Places of the project (if applicable).

*** Entity must receive Diocesan Bishop approval first.**

* Entity reviews and meets with Sacred Places Committee until approval.

* Sacred Places provides 1-page recap of approval to OCRE.

* Note - if an existing Church is being demolished as part of construction, additional canonical approvals are required.

9. OCRE gathers all 1-page recaps of approval and provides them to Bishop, COO and CFO.
10. Bishop consults with COO and CFO (and Sacred Places if applicable). Bishop informs Pastor or President in writing to move to next phase. (FORM CR-APP2)

Pre-Construction Process

11. OCRE identifies in writing next steps and which parties must be hired for the project, if not already hired (Architect, Qualified Project Manager, General Contractor).
12. Entity hires the appropriate parties and develops construction documents (Design Development, Final Construction Drawings & Documents).
13. COO presents final Construction Drawings & Documents for Bishop approval; Bishop sends final approval in writing for construction to begin. (FORM CR-APP-FINAL)

14. Entity May Begin Construction upon Receipt of Bishop FINAL approval

15. Upon completion of project, entity receives the Certificate of Occupancy from the municipality (if applicable) and prepares the Property Insurance Building Report for submission to OPCC to obtain insurance coverage.

Construction or Renovation: Any newly constructed building or structure or any significant modification which results in a different form or purpose for an existing building or structure.

OCRE = Office of Construction and Real Estate.

OPCC = Office of Purchasing, Contracts and Claims.

10/04/2022

Diocese of Dallas
Repair or Maintenance Project over \$750,000 - Process Flowchart

Initial Consultation

1. If Repair or Maintenance is due to an insurance loss, file claim with OPCC.
2. Entity President reviews project with appropriate internal boards / councils. Entity contacts OCRE to discuss project.
3. OCRE will identify in writing any additional approvals if they are required (copies to CFO and Sacred Places, if applicable).

Review Process

3a. Diocesan CFO contacts Entity to understand funding.

*Entity provides Parish Finance Council written approval.
 *If financing required, Diocesan CFO reviews.
 *CFO provides email approval to OCRE.

3b. OCRE notifies Sacred Places of the project (if applicable).
Entity must receive Diocesan Bishop approval first

*Entity reviews and meets with Sacred Places Committee until approval.
 *Sacred Places provides email approval to OCRE.

3c. Bishop Burns Consent (If project > \$750,000)

*Bishop consults with OCRE and COO to give consent.
 *Bishop informs Diocesan Finance Council and College of Consultors of decision.

Pre-Construction Process

4. OCRE identifies in writing next steps and which parties must be hired for the project.
5. Entity hires the necessary parties as identified by OCRE.
6. All construction documents are submitted to OCRE.
7. The Final Construction Documents are approved in writing by the OCRE. (FORM RM-FINAL)

8. Entity May Begin Repair & Maintenance

Repair or Maintenance: Efforts undertaken in order to restore, preserve or upkeep an existing building or structure.
 OCRE = Office of Construction and Real Estate.
 OPCC = Office of Purchasing, Contracts and Claims.